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Minimum Qualification Specifications
for the Class:

DISTRICT TAX MANAGER

Basic Education/Experience Requirement:

Bachelor's degree from an accredited four (4) year college or university with at least 12 semester credit hours in accounting and/or auditing subjects.

Excess Specialized Experience or any other professional, administrative or analytical work experience described below, which required the knowledge and application of accounting and/or auditing principles, theories and practices may be substituted for the Basic Education requirement on a year-for-year basis providing the applicant can show that he/she possesses knowledge of, and is able to apply, accounting and/or auditing principles, theories and practices.

Excess Specialized Experience or any other professional, administrative or analytical work experience which did not require the knowledge and application of accounting and/or auditing principles and practices may be substituted for the Basic Education Requirement on a year-for-year basis, providing the applicant has successfully completed at least 12 semester credit hours in accounting and/or auditing subjects from an accredited college or university.

The education or experience must have demonstrated the ability to write clearly and comprehensively such materials as reports and analyses; read and interpret complex written material; and solve complex problems logically and systematically.

Experience Requirements: Except for the substitutions provided for below, applicants must have had the kind and quality and amounts of experience shown in the paragraphs below; or any equivalent combination of training and experience.

General Experience: One (1) year of experience in any one or a combination of the following: 1) professional accounting or auditing experience; or 2) experience teaching accountancy at the college or university level.

Specialized Experience: Three and one-half (3-1/2) years of progressively responsible professional accounting and auditing experience requiring interpretation and application of federal and/or State tax laws, rules and regulations, knowledge and application of generally accepted professional accounting and auditing principles, theory and practices for the purpose of analyzing and interpreting accounting books, records, or systems

in terms of their effect on tax liabilities and their adequacy for recording transactions affecting tax liabilities.

Supervisory Experience: One (1) year of experience which involved supervising others and included: 1) planning, organizing, scheduling, and directing the work of others; 2) assigning and reviewing their work; 3) advising them on difficult work problems; 4) training and developing subordinates; and 5) evaluating their work performance, and disciplining them when necessary.

Managerial Aptitude: Managerial aptitude will be considered to have been met through successful performance of, or substantial participation in, organizing, scheduling, and coordinating a group of activities in order to attain program objectives within time, resource and budgetary limitations; interest in management demonstrated by the performance of work assignments in a manner which indicates awareness of problems and the ability to solve them; completion of educational or training courses in the areas of management accompanied by the application of principles, which were learned, to work assignments; management's observation and evaluation of the applicant's leadership and managerial capabilities; and success in trial assignments to managerial and/or administrative tasks.

Non-Qualifying Experience:

- A. Experience in a tax program limited to clerical processing of tax information, documents, interpretation and application of tax laws, rules and regulations will not be accepted as qualifying.
- B. Experience as a periodic or part-time employee which involved primarily the preparation of individual income tax returns in a routine pre-determined format will not be accepted as qualifying.

Substitutions Allowed:

- 1. Possession of a bachelor's degree from an accredited college or university with a minimum of 24 semester credit hours in accounting subjects may be substituted for all of the General Experience requirement.
- 2. Satisfactory completion of academic requirements for a master's degree in accounting from an accredited college or university with emphasis in tax (at least one course in Tax Research, and one course in Tax of Business Entities; and elective courses such as Taxation of Partners/Partnerships, Advanced Corporate Tax, and Estate and Gift Tax) may be substituted for one (1) year of the Specialized Experience requirement.

3. Possession of a law degree from a School of Law, accredited by a nationally recognized specialized accrediting body (or a law degree that is deemed comparable by a nationally recognized specialized accrediting body), which included course work in tax laws may be substituted for one (1) year of the Specialized Experience requirement.

Quality of Experience:

Possession of the required number of years of experience will not in itself be accepted as proof of qualification for a position. The applicant's overall experience must have been of such scope and level of responsibility as to conclusively demonstrate that he/she has the ability to perform the duties of the position for which he/she is being considered.

Selective Certification:

Specialized knowledges, skills and abilities may be required to perform the duties of some positions. In such positions, certification may be restricted to eligibles who possess the pertinent experience and/or training required to perform the duties of the position.

Agencies requesting selective certification must show the connection between the kind of training and/or experience on which they wish to base selective certification and the duties of the position to be filled.

Tests:

Applicants may be required to qualify on an appropriate examination.

Physical and Medical Requirements:

Applicants must be physically able to perform, efficiently and effectively, the essential duties of the position which typically require the ability to read without strain printed material the size of typewritten characters, glasses permitted, and the ability to hear the conversational voice, with or without a hearing aid, or the ability to compensate satisfactorily. Disabilities in these or other areas will not automatically result in disqualification. Those applicants who demonstrate that they are capable of performing the essential functions of the position will not be disqualified under this section.

Any condition which would cause applicants to be a hazard to themselves or others is cause for disqualification.

Any disqualification under this section will be made only after a review of all pertinent information including the results of the medical examination, and requires the approval of the Director.

Mental/Emotional Requirements:

All applicants must possess emotional and mental stability appropriate to the job duties and responsibilities and working conditions.

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This is to reinstate, change the class code from 17.219, and amend the minimum qualification specification requirements for the class DISTRICT TAX MANAGER, which was approved on November 19, 1984.

DATE APPROVED: 8/22/97

/s/ Dawn M. Young
JAMES H. TAKUSHI
Director of Human Resources Development